JOINT ELECTRONIC COMMERCE PROGRAM OFFICE
8725 JOHN J. KINGMAN ROAD, SUITE 1655
FORT BELVOIR, VA 22060-6205

IN REPLY
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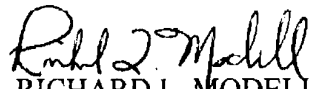
Logistics EDI IPT   June 9, 1999

MEMORANDUM FOR: DISTRIBUTION

SUBJECT: Adoption of Commercial ED1 Standards for DOD Logistics Business
          Transactions - Integrated Product Team (IPT)

    The next meeting of subject IPT will commence at 0900 on June 25, I999 at the
Logistics Management Institute (LMI), McLean, VA. The primary focus of this meeting
will be to determine if the implementation plan is ready for formal staffing (see Web site
www.log.edi.migration.hq.dla.mil   for additional IPT information). Attached for your
review and comment are draft minutes and actions that resulted from the May 27, 1999
meeting. Subject to comment, the IPT Chairman will approve these minutes and actions
on June 25, 1999. Point of contact is Mr. George Kingsley, (703) 767-0068,
george-kingsIey@hq.dla.mil.

                                             RICHARD L. MODELL
                                             Lt Col, USAF
                                             IPT Chairman

Attachments:
1. Minutes of Meeting
2. Attendees
3. Action Items

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Director, Joint Electronic Commerce Program Office (CTC), (PTI)

Minutes
Adoption of Commercial EDI Standards for DoD Logistics Business Transactions
Integrated Product Team (IPT)
May 27, 1999

Welcome, meeting overview, and administrative remarks: The meeting commenced with the Chairman thanking everyone for attending. Administrative announcements, introductions, and a review of the agenda were shared with the attendees.

Review of Implementation Plan issues, disconnects, and second draft schedule: The briefer began by pointing out that the IPT had diverted from the plan to have a second draft distributed for this meeting. This decision was based on the intent to publish a more integrated document that better reflects the IPT efforts and to resolve issues and disconnects that were apparent in the first draft. He systematically outlined actions that were underway to integrate the document: overall editing for grammar, punctuation, style, numbering, terminology, bibliography, references, etc. and the development of chapters and appendixes to eliminate redundancy and expand on key points.

A discussion ensued regarding the use of terms within the plan. The briefer stated that it is difficult to maintain consistency of terms through the editing process. Examples of terms that become intertwined include Defense Logistics Management Standards (DLMS), Electronic Data Interchange (EDI), Electronic Business/Electronic Commerce (EB/EC), Federal Logistics Implementation Conventions (FLIC), and Standard Defense Logistics Rules (SDLR). This discussion concluded with the Chairman asking that DLMS be used as the dominant term throughout the plan. His position is that the definition of DLMS had been expanded and until "someone" decides that a better term should be used, DLMS will remain the IPT's term of choice.

There was a short discussion on who will be responsible for the management of the overarching schedule that pulls the implementation together. The Chairman emphasized that the Services and Agencies must first lay out their logistics modernization plans. Second, with those plans the Defense Logistics Management Standards Office (DLMSO) will be responsible for establishing corporate schedules and priorities that allow for the smooth migration of DoD to DLMS.

The Defense Information Systems Agency (DISA) mentioned that they had concerns with trimming Appendix B (Architecture) as mentioned during the briefing. They made the point that editors must concern themselves with the full essence of a technical architecture and if not, some required elements may be lost through the editing process. The Chairman suggested that the editors continue with their work and those type of problems can be discussed and resolved through the staffing process.

In conclusion, the following implementation plan schedule was approved by the IPT membership:

Date	Purpose	Meeting
June 18, 1999	Draft plan to IPT membership	No
June 25, 1999	Review and approve draft plan for Service and Agency formal staffing	Yes
July 13, 1999	Release plan for formal staffing (Suspense – August 13, 1999)	No
August 19-20, 1999	IPT review, integrate, approve draft plan for forwarding to DUSD(L) and CIO for signature	Yes

Appendix E – Service and Agency implementation plan requirements and schedule:
The Chairman conducted an informal discussion regarding Service and Agency implementation plan requirements. After a review of the various Service and Agency requirements, the following question and answer session ensued:

- Question: What Service and Agencies are required to provide an implementation plan?
  Answer: At this point Army, Navy, USMC, Air Force, Defense Logistics Agency (DLA), Transportation Command (TRANSCOM), and Defense Security Cooperation Agency (DSCA).
- Question: What is the applicability of the Service and Agency plans to the EB/EC plan requirement?
  Answer: The Chairman suggested that these two requirements are related and the Services and Agencies should review the requirements outlined in the EB/EC strategic plan. Both requirements may be accomplished concurrently.
- Question: Why would cost be included in Service and Agency plans?
  Answer: The Chairman remarked that based on frequent visits with DUSD(L)(LSM), cost is to be included as an integral element of the plan. He further tasked the IPT support group to review the cost requirement for the Service and Agency plans and report their results at the next meeting.
- Question: Can the training and risk management requirements be expanded to be more explicit of requirements?
  Answer: The Chairman agreed and asked the support group to expand these sections of the Appendix.

The discussion concluded with the IPT agreeing to: provide Service and Agency plans within 180 days of the signature of the corporate plan. Continue to meet bi-monthly during the 180-day period to maintain momentum and continuity of effort. Beginning in 1QFY00, Service and Agency plan efforts will be briefed to the Logistics Information Board (LIB).

Action item updates: The following open actions were discussed:
- EDI Policy – The Chairman canvassed the IPT to determine if there were any major issues, show stoppers, or problems with meeting the June 4, 1999 suspense for comments. None were identified.
- Automatic Identification Technology (AIT) – The IPT was informed that an AIT information paper had been posted to the EDI IPT Web site. The intent of this paper was to close out IPT concerns with AIT data standards.

- Funding Nominations – The Chairman expressed his concerns that this effort had taken "entirely too long" and that he would do whatever he could to expedite the process.
- EDI Costing Criteria – Corporate-costing criteria were presented to the IPT as an information topic. The Chairman mentioned that this is an ongoing effort and, similar with the Service and Agency cost, he would encourage the IPT support group to continue to define and refine this effort.
- Security – This action was closed with the Chairman stating that the DoD information security solution being worked as part of the DoD-wide security policy will be the logistics EDI solution.

Wrap-up: The meeting concluded with the Chairman thanking everyone for their attendance.

Attendees
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, May 27, 1999

Army	*Navy*	*Air Force*	*USMC*
Mr. Carey	Mr. Minnick	Ms. Larson	Ms. Matsumoto
Ms. Dunnington		Maj Westgate	
MAJ Nelson		Mr. Carlson	
Ms. Akins			
NSA	*DLA*	*TRANSCOM*	*MEDLOG*
Mr. Nobles	Ms. Broussard	LTC Black	Ms. Agnew
DFAS	*DSCA*	*NIMA*	*JITC*
Ms. Abejuela	Mr. Freedenthal	Mr. Strong	Mr. Lynch
Ms. Hughes	Mr. Goldstein		
	Ms. Taylor		
DAASC	*JTAV*	*DISA*	*DLMSO/JECPO*
	Mr. Soechtig	Mr. Law	Mr. J. Johnson
		Mr. Kye	Mr. Yeakel
DLIS	*Acq Reform*		Mr. Obey
Mr. Behrendt	MAJ Hoeferkamp		Lt Col Modell
			Ms. Savage
			Ms. Johnson
			Mr. Thomas
			Mr. Egan
			Mr. Jensen
			Ms. Amyx
			Mr. Kingsley
			Mr. Gower
			Mr. Lewis
			Mr. St. Mark
			Ms. Hilert
			Mr. Fitzhugh
			Mr. L. Johnson

Attachment 2

Action List
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, May 27, 1999

Number	*Action/Comments*	*Suspense*	*Lead*
1-20-99-01	**Approve IPT Charter** - • IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for approval at the 2/9-10/99 IPT meeting. • Incorporate changes received during previous staffing and during meeting. Post to WEB with suspense for input by 3/1/99. Present for signature to Director JECPO and DUSD(L)(LSM). Include as a briefing point at the 3/5/99 LIB. • DUSD(L)(LSM) signed Charter 3/8/99. Director JECPO signed Charter 3/12/99. Signed Charter posted to WEB.	Completed	Chairman
1-20-99-02	**Approve IPT Terms and Definitions** - • Mr. Lenny Johnson (project facilitator) will modify current terms and definitions to include source information by 1/21/99 and provide to IPT membership via the IPT web site. IPT members will review and provide comments by 2/5/99 to Mr. Johnson. Mr. Johnson will incorporate changes as appropriate and brief for approval at the 2/9-10/99 meeting. • Will continue to update IPT membership through WEB and during meetings. - Will review Charter, Plan Outline, and Policy to ensure completeness of document. - Will transition to become "glossary of terms" in final Implementation Plan. • IPT Chairman will define the term DLMS to encompass other emerging EB/EC methods that may have future application to the overall EDI effort.	Ongoing Ongoing Completed	Chairman

1-20-99-03	**Approve Implementation Plan Outline** -	Completed	Chairman
	• Mr. Mark Crawford (project facilitator) will modify current Implementation Plan Outline with a sentence or two for each major heading and provide to IPT members by 1/28/99. IPT members will review and provide comments by 2/5/99 to Mr. Crawford. Mr. Crawford will brief for approval at the 2/9-10/99 meeting.		

	• Chairman will assign Action Group leads for developing the following sections of the Implementation Plan:
	  • Part 1-Introduction
	  • Part 2 – DLMS Implementation Plans
	    • New Systems (separate group)
	    • Legacy Systems (separate group)
	  • Part 3 – Implementation Management Plans
	  • Part 4 – Operation Management Plans
	  • Appendix A – Operating Concept
		Completed	

	• Tasking will include a "data call" for each of the Services and DLA to identify by name Action Group leads and support members for each formed Action Group. In addition, Chairman will name IPT Support Group facilitator(s) for each Action Group.	Completed	
	• Follow-up request sent to Services and Agencies for names of Action Group members.	Completed	
1-20-99-04	**Service and Agency EDI Briefings** - • Briefings will be provided in accordance with outline provided in administrative portion of the minutes above. Briefings by other IPT participants are optional. Time will be provided on the agenda to accommodate this option.	Completed	Services and Agencies

1-20-99-05	**DoD Logistics EDI Policy** - • IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting.	Completed	Chairman
	• Chairman will consolidate inputs, revise policy, and brief to DUSD(L)(LSM) for approval.	Completed	
	• Will research to determine preferred method to promulgate policy.	Completed	
	• Draft policy delivered to DUSD(L)(LSM) 3/8/99	Completed	
1-20-99-06	**Candidate Program/Project Funding Nominations**- • IPT members will review and provide comments by 2/5/99 to Mr. Frank St. Mark (project facilitator). Mr. St. Mark will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting. Based on comments and follow-on issues, Mr. St. Mark will continue to move toward final resolution/approval of programs/ projects by 3/18-19/99.	Completed	Chairman
	• IPT approved criteria with minor comments 2/10/99. Mr. St. Mark will revise criteria and issue a "data call" for nominations 2/12/99. This data call will include available funds by appropriation. Suspense for nominations will be 3/1/99. Action Group will convene 3/2-3/99 and develop a prioritized listing of nominations for presentation at the 3/4/99 IPT meeting.	Completed	
	• Prioritized listing, including new nominations received after original submission suspense was extended, will be presented to IPT 3/18-19/99	Completed	
	• Final list of approved FY99 projects presented to IPT 4/22/99.	Completed	

1-20-99-07	**IPT Voting Members** - • Chairman will revisit (based on IPT comments) the issue of IPT voting membership and reflect his findings in the next iteration of the IPT Charter.	Completed	Chairman
1-20-99-08	**DoD EDI Translator Requirements** - • Pending appointment of an "action group," IPT Chairman will begin to define/scope the DoD EDI translator requirement. This issue is inclusive of Corporate/Service/Agency requirements.	Completed	Chairman
	• 2/10/99 DLA and DISA agreed to co-chair an Action Group to define and begin the process of requirement determination.	Completed	
	• Mr. St. Mark will facilitate this action as a sub-task of the Action Group charged with developing Appendix B of the Implementation Plan.	Completed	
1-20-99-09	**IPT Non-DoD Issue Resolution -** • Develop a procedure, based on the fact that the IPT's primary focus is on DoD EDI standards, on how non-DoD (GSA, NSA, NASA, etc.) elements will assist in issue resolution.	Completed	Chairman
1-20-99-10	**Civil Sector IPT Involvement -** • Develop a procedure by which civil sector EDI standards organizations can participate, advise, and consult on the IPT's efforts**.**	Ongoing	Chairman
1-20-99-11	**DLMS/DLSS Enhancements -** • Mr. Don Egan will prepare a comprehensive list of enhancements that are present in DLMS, but not in DLSS. This list will be provided to the Chairman by 2/5/99 for review and briefed at the 2/9-10/99 meeting. • Briefing given at 3/4/99 meeting	Completed	Chairman
1-20-99-12	**NASA and USPS -** • For participation in the 2/9-10/99 meeting, the Chairman will invite NASA, USPS, and DIA to participate in the IPT process.	Completed	Chairman

2-9-99-01	**DoD ROI Studies –** • Research to determine relevant DoD logistics EDI ROI studies completed/ongoing/ contemplated and provide results to IPT	Ongoing	Chairman
2-9-99-02	**DoD Logistics priorities –** • Research to determine the relative priority of EDI migration to commercial standards within DUSD(L).	Completed	Chairman
2-9-99-03	**Migration Standard Capabilities –** • Research, compare, contrast capabilities of XML vice ANSI ASC X12, or other available logistics standards, and provide results to IPT. White paper is posted on the IPT web site.	Completed	Chairman
2-9-99-04	**IPT E-Mail Address -** • Establish an IPT "common" e-mail address. • Address established but is limited to DLA addressees – effort continues.	Ongoing	Chairman
2-9-99-05	**IPT End-State –** • Research to determine a definitive "end-state" for EDI IPT.	Completed	Chairman
2-9-99-06	**Similar Efforts –** • Research to determine if similar efforts are ongoing within DoD/Non DoD Agencies. When applicable, add link to IPT WEB page.	Ongoing	Chairman
2-9-99-07	**"Oversight Organization" –** • In what will become a recommendation of the IPT, conceptualize and propose the "oversight organization" that will serve as the follow-on to this IPT. Major responsibility will be to oversee execution of Implementation Plan.	Ongoing	Chairman
2-9-99-08	**IPT Scope –** • Assess the ramifications of expanding the implementation plan to include other enablers such as AIT, XML, e-mall etc. This action can be accomplished through the re-definition of DLMS. DUSD(L)(LSM) will be briefed on the positives and negatives of this expansion. Results will be presented at the 3/4/99 IPT meeting.	Completed	Chairman

2-10-99-01	**Other Implementation Plans/Policies –** • Research to determine other plans, strategies, policies, lessons learned, etc., that should be referenced or tied to this effort.	Ongoing	Chairman
2-10-99-02	**Testing –** • Research and develop a strategy to determine future IPT testing requirements and test agencies to be utilized (Service and/or JITC).	Ongoing	Chairman
3-4-99-01	**Training -** • Subject to request the IPT Chairman is willing to provide training on DLSS, DLMS, or other IPT-related topics for individuals or Service/Agency groups.	Ongoing	Chairman
3-4-99-02	**Agenda Topics -** • Establishment of a mechanism for IPT membership to request agenda topics for future meetings. • Added to WEB page 3/5/99.	Completed	Chairman
3-4-99-03	**Coordination -** • Coordination with the U.S. State Department and U.S. Customs Office as the IPT process moves forward. • Chairman emailed U.S. Customs POC 3/11/99 inviting their participation in the IPT.	Completed	Chairman
4-22-99-01	**EDI/AIT -** • Develop AIT information paper that provides IPT with recommendation on how IPT should proceed in light of current AIT development. • Added to IPT Web site 5/26/99	Completed	Chairman
4-22-99-02	**Fundamental DLMS Briefing –** • Develop a briefing with focus on what is in place to support Service and agency program managers as they implement DLMS. • Incorporated into Implementation Plan	Completed	Chairman

4-22-99-03	**Security Recommendation –** • Develop an IPT security recommendation for the use of DLMS. • Briefed to IPT 5/27/99	Completed	Chairman
4-22-99-04	**Electronic Commerce Warehouse (ECW)** - • Develop an "ECW white paper". Paper should outline background, current capability, applicability and vision of the future to include security ramifications. • ECW contractor terminated	Completed	DISA
5-27-99-01	**Implementation Plan Costing –** • IPT support group will continue to research to determine DRID#48 cost criteria that support the cost of EDI implementation.	Ongoing	Chairman
5-27-99-02	**Service and Agency Implementation Cost –** • Cost be included as an integral element of Service and Agency implementation plans. The IPT support group will review cost requirements for the Service and Agency plans and report their results at the next meeting.	6/25/99	Chairman
5-27-99-03	**Training and risk management requirements** • The IPT support group will review and expand the training and risk management sections of Appendix E to be more explicit of corporate requirements.	6/25/99	Chairman

Attachment 3